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## The Briefing Process

*Examining the Client-Consultant Relationship through a case*

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# The briefing process: Examining the client-consultant relationship through a case

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## Abstract

This paper presents the outcome of a Master thesis in Service Design done at Aalborg University and it examines the client-designer relationship in the briefing process of service design projects, in order to highlight the importance of this crucial but often overlooked part of the design process as a whole. The authors explore this perspective through a specific case developed in collaboration with the Royal Library of Denmark.

Besides the case, further insights from professional practitioners are discussed to provide recommendations for how service design consultants and prospective clients alike may approach the service design briefing phase from both sides of the table.

**KEYWORDS:** briefing process, service design consulting, client-consultant relation

## Introduction

Service design is rapidly being established as an approach to problem-solving and it is expanding as a field of research. With several international conferences and networks of professionals, a growing amount of literature and multiple dedicated higher education programmes, the field gathers interest from industry, the public sector and academia alike. The approach is a way to new opportunities, where ownership is replaced with access, users are recognised as part of the value-creation process and understanding of experience is a driver for innovation. Plenty of successful cases highlight the usefulness of the approach (for example the Service Design Awards<sup>1</sup> and the Danish Design Awards<sup>2</sup>), and the process and tools have been well-described (Stickdorn & Schneider, 2011; Polaine et al., 2013; Sangiorgi & Prendiville, 2017; Klaar, 2015).





But how does the process of a service design project start? In this paper the authors set out to explore the briefing process and the client-designer relationship of a service design project

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<sup>1</sup> <https://www.service-design-network.org/award-about>

<sup>2</sup> <http://danishdesignaward.com/en/categories/>

The Royal Library of Denmark is a cultural institution involving university library, national library, and culture house. The SC of the library had as a main objective to improve the experience of the students that spend every day studying at the library, and as a sub-objective to create more attention around the institution. The authors worked on the development of a new service offering for students and used this specific case to investigate how a service design project actually start up, what kind of briefing is needed for fruitful collaboration between the client and the service designer and what client-designer relationship can then be established. The exploration of these topics is important to better understand how the actual practice of service design can be initiated, shared, and outcomes maximised (Boyer et al., 2013).

BRIEFING PROCESS					
	PRE-PROJECT	DISCOVER			DEFINE
 Consultants					
 Client	First Meeting Second Meeting	Introduction to Office	Staffer /Student worker Interview Staffer Interview Staffer Meeting Staffer Interview	Project Team Lunch Staffer Interview Staffer Meeting Staffer Interview	Process Update Doc 1 Brainstorm with Staffer 2 Brainstorm with Staffer 1 Project Direction Meeting 1
 Users (Students)		Student Interview	Student Interview Student Interview Student Interview Student Interview	Student Interview Student Interview Student Interview Student Interview	Workshop with students
 Experts			Experts Interview Experts Interview		Experts Interview

Besides the learning from the case, insights from professional practitioners were gathered through interviews and presentations in Denmark (3), Norway (1), and The Netherlands (1) (Table 1). As an outcome, this research presents tentative recommendations on how to deal with the briefing process from both sides of the table.

#	Region of Operation	Position of the Participant	Research Method
1	The Netherlands	Founder & CEO	Phone Interview
2	Denmark	Founder & Designer	Phone Interview
3	Denmark	Service Design Consultant	Presentation & Discussion
4	Norway	Studio Lead	Phone Interview
5	Denmark	Designer & Strategist	Presentation & Discussion

**Table 1: Field research overview: 5 different practitioners participated to the research.**

In the following sections, both *design briefing* and the subsequent *client-consultant relationship* will be introduced and the case will be presented with some reflections. This will be followed by a discussion of the client-consultant relationship in the briefing process and, in conclusion, recommendations will be represented.

## Client Relationship & Briefing Process

In recent years there has been several publications on methods deployed in service design processes (Blomkvist et al., 2010), whereas not much has been written about what the practice of service design requires of the client relationship. Some reports and papers have explored the actual deployment of service design (Akama, 2009; Kimbell, 2009) and some publicly funded projects were meant to make the benefits of service design available by outlining how to approach external agencies (Thoenen et al., 2015; Sangiorgi et al., 2015). These publications provide various degrees of insights into the process of working with service design, such as the general relationship-types Parallel, Collaborative and Integrated (Sangiorgi et al., 2015).

A parallel relationship is characterised by a traditional expert-client relationship, where the designers are hired for a job, which they then execute in parallel, or away, from the client, only to come back with a solution. A collaborative relationship is characterised by the designers leading the process after being hired, but still maintaining a very transparent workstyle. The process is of a more agile nature, which relies not so much on a final, polished deliverable, as on recurring reviews of progression with the client. An integrated relationship relies not so much on the execution of designers' skills as the presence of them in the client organisation. This relationship is seen when the overall objective is to transfer the designers' mode of working to the client organisation.

These kind of descriptions are no doubt helpful in understanding what type of relationship might fit in a given context, but few insights are provided about more concrete critical factors in the client-consultant relationship. Looking into the management consulting field of research might offer some hints. In their article "Consultant and client - working together?" Fullerton & West refers to a summary of three critical factors in client-consultant relationships (1996). These are:

1. The fit between consultant skills and client needs. This is crucial to get to the best possible solution;
2. Interpersonal fit. This denotes the conduct and general likability of both sides;

3. Ground rules. This factor refers to how mutual expectations to the consultancy process should be aligned from the beginning, with a clear explanation of the consultants' approach.

As an extension of the first point, which also hints back at the relationship-types outlined above, Williams (2001) point out that knowledge is not so much transferred as it is negotiated and framed as a story. This aspect of consulting aligns very well with the co-creational mindset of service design (Sanders & Stappers, 2008; Stickdorn & Schneider, 2011), which tells a believable, relatable story, rather than lecturing.

For this research, while examining client-service design consultant relationship, the authors choose to focus on the briefing process as the first step on the road to realising a project owing to the fact that ill-structured briefing process can result in unusable work, waste of money and demotivated designers and clients. In their book *Managing the Brief for Better Design*, Blyth & Worthington defines briefing as

*“an evolutionary process of understanding an organisation’s needs and resources and matching these to its objectives and its mission. It is about problem formulation and problem-solving. It is also about managing change. Ideas evolve, are analysed, tested and gradually refined into specific sets of requirements.” (2001, p.3).*

In some cases, the term briefing might be confused with a brief; hence, it is important to distinguish between these terms (Field, 2003). Blyth & Worthington makes this distinction by stating briefing is a process that begins without pre-conceived solutions, where options are reviewed and requirements articulated. Whereas a brief is a product of that process that formalises the key decisions and instructions in the project (2001).

The perception of briefing shifted from a process of discrete steps where design could not begin until the briefing stage completed, to articulating the aspirations of the client, and stimulating the design team (ibid.). When the authors look into the service design field from a process perspective, service design is an iterative, complex and ongoing process (Stickdorn & Schneider, 2011; Moritz, 2005). This matches well with the processual understanding of design briefing, and which will be discussed this later.

## Involving the client in the process of service design: a case study

The case project was initiated when the SC of the Royal Library of Denmark enquired about a thesis project at the institution, because the SC was interested in trying to work with service design. This open starting point of the project makes it a compelling case to examine the briefing process through. The Finnish service design agency Hellon has identified two client archetypes, the solver and the advocate, which are characterised by their aim with soliciting a collaboration with service design professionals (Einiö et al., 2016). The solver is focused on a specific task at hand, while the advocate is trying to introduce the approach to the organisation. The SC was identified as an advocate early on, and they were a tremendous help in involving staff in the process, which is a crucial activity to ownership and common purpose when working with service design (Akama, 2009).

The SC initially asked for research about students as users of the library, as they had some assumptions on why students are using the library but they did not have any research about the target group, and any idea or strategy on how to improve the service offering.

At the beginning, two meetings were done with the SC to clarify expectations around the project, and this was a crucial period in establishing the open-ended design process over

concrete outcomes. The suggested timeline for the project was presented, as well as the intended approach by outlining the phases of the double diamond framework (Design Council, 2007). Before starting the research, the authors built a blog<sup>3</sup> to share the key issues regarding the process with the different stakeholders.

Because of the very open brief, the inquiry started quite widely and it focused on qualitative research that could define the direction of the project and help to ask better and more relevant questions going forward. The main source of data was in-depth interviews with various stakeholders. Interviews were conducted with students from BA to PhD level about their habits around library usage and how they study and learn. Furthermore, interviews were set up with staff in both library and culture departments of the Royal Library of Denmark, and several library subject matter experts (SME) were interviewed.

This data was analysed by mapping current offerings, finding patterns of users, defining tangible problems and value constellations (Figure 2). Through the interviews and observations, it was clear that there were a handful of diverse problems which could all be solved with small, focused projects. Since the client did not have any research about the target group, the research validated some of the problems that the library staff was aware of. The client was initially focussed on touchpoint improvements, but they quickly realised that this project was an opportunity to introduce a new kind of user-focused approach into the organisation. To explain this reframing, a new value constellation was presented to the client. The multi-level service design-model by Patricio & all (2011) provided an accessible way to put into words what the research meant in terms of organisational impact. (Figure 3).

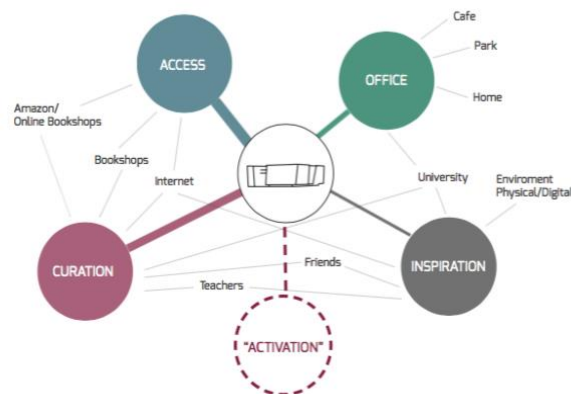


Figure 2: The value constellation map of the main values the library is offering.

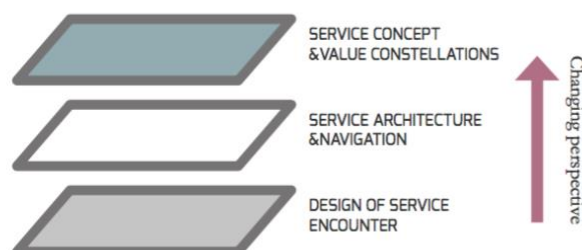


Figure 2: Multi-level service design-model (adapted from Patricio et al., 2011)

<sup>3</sup> <http://www.libraryinnovation.tumblr.com>

During the research phase, the small tangible problems that referred to the level of the service encounter were easily mapped out and were very important to suggest solutions that could create a dialogue with the client - enabling the team to move toward a more holistic customer-centred strategy (Reason et al., 2016; Thoelen et al., 2015).

This way of looking at organisations through different layers can be likened to looking at it through what Reason & al (2016) calls customer lifecycles or what Normann (2001) calls the difference between inherent and positional value. In this context, the latter refers to how the value that the library provides increases if it can position itself in the context where it means the most to users. This approach was used to continuously align with the client on which level possible interventions would have the most impact, and it helped to begin looking outside the organisation to understand the value constellation of which is part. These points are discussed in the following section.

During the reframing, the focus was on the improvement of the students' experience while attracting attention to the library and giving particular consideration to their role as paying future audience of the events at the Culture House. The research showed that students were using the library either as an office space or as a place for accessing electronic materials, indicating that the library was used and seen mostly as a silo to access rather than a platform of learning. So the question became about what kind of offerings the library could provide to support this shift.

When the project direction was clarified, the authors shared the first one-page process update document. During the design process, the client was regularly updated about the findings and the process through specific update documents. Furthermore, the client was involved in the ideation-brainstorming, design critique, testing, and final evaluation of the project. As a final outcome of the project, a service concept was created. The final deliverables were a video of the concept<sup>4</sup> and a report<sup>5</sup> detailing the concept with an implementation plan and an idea catalogue, which gathered all the ideas generated during the co-design sessions.

## Discussion of the Client-Designer Relationship through Briefing

Building on the case described in the previous section, there are several issues worth reflecting on.

The process was of a collaborative nature as described by Sangiorgi & all (2015) since the authors were leading the project but kept the SC and other relevant stakeholders very close through the process. The relationship-type was further underlined by the way the authors did not present a finalized deliverable, but rather made a point of enabling the department to go forward with testing instead of going directly to implementation. This kind of agility and hand-over support is essential in a collaborative relationship, and it was something that improved the process as it allowed for a flexible and open-ended briefing process.

### Client-Designer Relationships in Service Design

In the following section, the process of the case will be examined through the lenses of three crucial points regarding client-consultant relationships: skill-need fit, interpersonal fit and ground rules.

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<sup>4</sup> <https://www.youtube.com/watch?v=YbcBPukrrPE>

<sup>5</sup> [https://issuu.com/begumbecermen/docs/thesis\\_product\\_report\\_final](https://issuu.com/begumbecermen/docs/thesis_product_report_final)

## Skill-Need Fit

There was a good fit between what the client expected from authors, and what the service design approach could deliver. In particular, the fact that the process relied on an open-ended discovery, made it a very apt approach for the original client request. This stands in stark opposition to general management consultancy, which relies on expertise within a given field and is supposed to generate answers fast (Bloch, 1999). In addition to this point, general consultancy is often portrayed with a guru-like expert, who is paid to share their knowledge (ibid.). The service design approach, on the other hand, requires the client not to be passive, and to get involved in several stages of the process. For example, in the way clients have control over information of use, which has to be drawn out and applied in a co-creational fashion (Han, 2009). To act on this point during the briefing process, it is essential to be clear about available information and discuss the limits this might pose to the project early on.

The original request was very open-ended, and this provided a good context to get the maximum value out of a service design process. First and foremost, the authors were able to ground their ideation in a good understanding of the context, the organisation and of end-users. This was an essential part of the fit between skills of the authors as designers and the client's needs and was apparently a deliberate choice on the side of the SC. This meant that the authors were asked to investigate and ask questions but had no agenda to live up to.

The relevancy of the holistic aspect of the service design approach became clear as the collaborative consultant position allowed the authors to question everything and to rediscover the organisation with new eyes, using novel tools to visualise it. The client's feedback echoes the following point "Sometimes you are so 'deep' into the service or organisation you wish to reform, that you are blind to the outside world." (Thoelen et al., 2015).

These factors enabled the authors to come up with a solution that made sense to the organisation, but which they would not have come up with themselves. Coming in from the outside allowed the design team to ask questions across boundaries and make suggestions uninhibited by organisational do's and don'ts. Especially if the authors had not gone through the library research, they would not have seen the culture department in light of learning, because learning was not a discourse the client had used at all. Building on these premises, the authors brought fresh eyes and took a solution that has worked in other sectors and framed it for a new context.

## Ground Rules And Transparency

Although the authors attempted to be clear about how they would approach the project from the beginning, it was realised that it had been insufficient. When the authors interviewed the SC about their experience of the process, it was surprising to hear that they would have liked to see the double diamond-model at an earlier stage, to have an overview of the approach. One way the authors might have done this better was to visually merge the double diamond-model and their timeline, instead of splitting out the convergent-divergent dynamics of the approach.

Another point to be highlighted about how to support the briefing process in terms of transparency is the way the authors shared semi-formal project updates. These updates underline the processual dimension of briefing, as opposed to one final brief to be taken home. The updates are in a sense regular invitations to discuss the project as it evolves in the early stages. Akama (2009) also points out how including the director of the organisation in the twists and turns of the project, is very valuable to gain trust. These one-page project process update reports were the attempt of the authors at doing this and contributed discussions on directions as the design process unfolded.



As it has been mentioned before, the SC was a valuable advocate of the project within the organisation and for this reason they were continuously kept in the loop with material about the process with the aim of empowering them. In addition to the short update reports, the authors continuously specified recent progress as well as next steps and shared thoughts on the project along the way through the blog, which client staff was encouraged to check from time to time. To support the SC's advocacy in a stronger way it could have been useful to share more anecdotes and method outcomes, so they would have concrete examples of potential value. The way in which the SC was involved in the process was satisfying and helped to explain not only the final concept but also the different qualitative methods deployed throughout the process. This carries a crucial co-creational point about engaging stakeholders in a way that is about more than only exploiting their knowledge of the organisation, and it points to the necessity for the service designers to gauge expectations towards the co-creational aspects of the project early on.

Another crucial point has been the setting up of the project in the beginning. The SC revealed that it had been difficult for the supervisor's approval because of the fear of the "exploratory phase" of the collaboration, where the authors had to go through "a problem-finding phase". The organisation had apparently been wary of "being found out", and what would happen with the problems that might be uncovered. Would they get published and hurt the brand or their positions? Looking back the authors should have been focusing more on the positive qualities of exploring an opportunity space. In this vein, the SC had been framing the project internally as a way to create loyalty and attract more customers, which is the kind of relatable outcome managers appreciate. In terms of the briefing process, this carries an important lesson with regards to framing the project in positive terms for the client and maintaining this perspective even as the scope might change through research and synthesis.

Furthermore, the process started by listening to client concerns and it laid them out as the research confirmed them - even though the authors could see there was room for generating more value, than simply fixing the lower-level, more tangible issues. This approach was confirmed in interview #1 (See Table 1); the interviewee also sometimes gets a brief focussed on one deliverable, which is then reframed through service design tools such as customer journeys, to enable them to commence the higher-level or strategic, design processes. When the authors look back to the case, this reframing was achieved through the multi-level service design model and present and future value constellations.

## Briefing as a Process for Service Design

The briefing is a process, not a finished document. This point is especially relevant in a service design context because the approach is open-ended, and since it is fundamentally a human-centred design discipline, it should be based on research which can inform choices. But what does this mean in practice? In the case portrayed, some ground rules had been laid out at the beginning of the process, by having a meeting in the pre-project-phase where a timeline with the methodology and key milestones was shown. Nonetheless, the processual perspective acknowledges that the outcome is not clear in the beginning. However, embracing this perspective is easier said than done, because service designers will often need to show early on what it will be done and when it will be done, like the authors saw with the SC's persuasion of their supervisors. Having a clear story with cases ready can help to show when outcomes tend to be reached, and what kind of insights had to be acted on: the way processes are presented make a big difference. Instead of focussing primarily on solutions and outcomes, more could be done to prime the clients to look more forward to the research phase than to the solution's outcome.

On the other hand, designers may get caught up in the research and not be able to move past insights. Openness is essential to the design process, and according to the interviewee #4 (See Table 1), the ideal briefing process allows for questions rather than answers. However, there is a balance to be struck because freedom is both a blessing and a curse. The

interviewee #2 (See Table 1) also related how long time they sometimes spend in the pre-project finding out what the actual problem was. They did this by asking “why?” and “what does that mean?” to get to the bottom of the client’s problem. The authors felt something akin to this in the process because there was no yardstick to measure ideas. Another practitioner #3 (See Table 1) clarified that asking for key performance indicators (KPI) and even asking the client to do research to uncover KPIs was crucial. Conversely, if consultants are too closed in the request, they might not allow for the proper questioning of the premise of the project. However, if consultants achieve higher buyer competency (Interview #4) (See Table 1), they may shorten the pre-project phase substantially. Buyer competency refers to the client’s ability to understand the process they are procuring, and what they may expect of it. In the case of service design, it may refer to an understanding on the client-side: research into current practices and attitudes is crucial to understand which problem to solve, and then how it might be solved best.

From this perspective, the ideal service design process may be said to see the service designer having a say in the whole design process. However, this requires substantially trust, as there are significant barriers to lay out the entire process from the beginning. Considerations about implementation cannot be meaningfully undertaken before the actual concept outline is in place. Thoelen & all (2015) suggest that public organisations which have little experience with service design, should not start with a too complex project even though the potential impact is large. Starting with a modest project would show the organisation what they can achieve, regarding solving problems or finding new opportunities with service design. After having a successful experience, and the service design approach is recognised, the organisation can be equipped to work with more ambitious, large-scale service projects. In the use case, it was the first time that the client had service design consultancy. Together with the client, the authors chose to go forward with a concept which was not too complicated, to keep it implementable, taking into account the context of budget cuts and resource requirements. Following this, an outline and cost structure for the further implementation of the concept idea was also provided. The responsibility of service designers in terms of implementation is an entirely different discussion, but one point to draw from the case in this thesis is the value of having meetings planned, which emphasises transparency of the past process as well as setting the scope for future actions.

A skill of the service designer relating to this point which comes to light is the ability to steward divergence (Boyer et al., 2013; Service Design Network, 2015). Specifically, this is the ability to give direction to a process when designers do not know where they are going to end. Stewarding also implies a more collaborative relationship, which is fundamental to a co-creational design process, as opposed to the artistic inspiration of a more traditional understanding of design.

Going back to the discussion about briefs versus briefing, the static brief might be said to be a remnant of a traditional understanding of design. This is because a previously common request would be based on a petition for a solution for a problem outlined in brief. #5 mentioned how many clients still ask specifically for solutions such as a website or an app without any exploration of whether or not the supposed solution fits the presumed problem. The real value potential is unlocked in the exploration and validation of problems through the discovery phase in the design process and through methods such as prototyping.

In this case, the design process was characterised by briefing as a process; as shown in Figure 4 it stretched from the pre-project clarification meetings through the define phase. The process was grounded in diverse stakeholder input, so a relevant problem statement was developed.

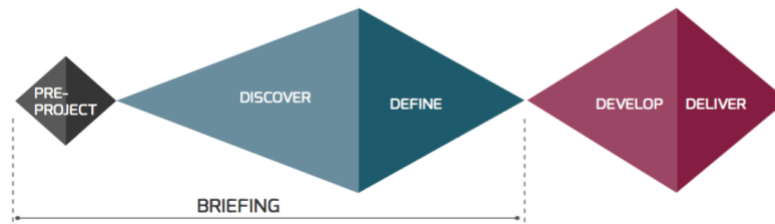


Figure 4: Briefing process of the project showed on a stretched Double Diamond to fit the actual project timeline (Design Council, 2007).

## Conclusion

In this paper, a service development project with the Royal Library of Denmark has been used as a case to focus on the service design briefing from both client and consultant perspectives.

The potential implications of service design in terms of both organisational structure and user experience demand that the initial posed questions should not be too specific, as their specificity would narrow the opportunity space unnecessarily. Rather, a process might be initiated with an open-ended request to explore a given business area and choosing how to approach the briefing and relationship building can support this process.

Looking back at how the authors approached the client's expectations with the multi-level service design model (Patricio et al., 2011), it was clear that the different levels of service design interventions were not taken explicitly into account when the request was made. The level on which the project should/will be conducted is difficult to determine from the beginning, as the process is based on research, and therefore inherently needs to open up and explore the field first. In the process, it was clear that initially there was a misalignment between how the authors talked about the project and how the client was framing it. Yet by approaching briefing as a process, the open-endedness of the service design approach was productively achieved.

The authors have drawn the following recommendations as an outcome of the research. It may benefit service design consultants and prospective clients alike, to get the most effective service design processes started up smoothly. These points are divided into what service design consultants should be aware of, and what could be said to guide clients through the process of a service design project.

A service designer should:

- Talk about opportunities and not problems. Have a more constructive conversation from the start;
- Be clear about continuously explaining the fuzzy back end of the design process and showing what happens when would ease the communication;
- Address explicitly the client's fears and doubts to build a trustful relationship.

A client that is opening up to the design for services approach should:

- Be prepared for an open process, but have in mind how the outcomes might be measured;
- Provide basic facts and data;
- Be ready to be involved in the process and

- Acknowledge that briefing is a process that has to be embraced by the organisation from the very start.

To conclude with the designer perspective, as the head of the international service design network Birgit Mager has stated, “We shouldn’t let ourselves be put into too limited a briefing, or we should reframe the briefing so it guarantees the opportunity to design valuable interventions.” (Newhouse, 2015).

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